Basic Elements

Basic System Elements

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Menus

1. **Menu:** The I-SMART main menu appears in the far left column of the screen. First level menu items are left-most aligned, and may include **Home Page, Agency, Client List, Reports, and My Settings**. However, depending on the user's access level, some may not be visible.

   There are over 200 screens in I-SMART, but far fewer are used for data entry. For ease of navigation, screens are organized by function. Therefore, **Client List** will have a complement of screens which relate to the management of clients. These screens are accessed and organized through a second level sub-menu.

2. **Sub-menus:** Once the user has selected a higher level function using the First level menu, such as **Client List**, the menu expands to display the second level sub-menu. The sub-menus allow the user to navigate to specific screens without having to use next and back keys. If a menu item has a sub-menu, you will see a small triangle pointing to the right of the label. The triangle will point down when the sub-menu is displayed (menu expands).

3. **Highlighting Selections:** When you place your cursor over a menu item, it is outlined with a dotted box. Use a single, left-click of your mouse to select the menu item and display the associated screen. When selected, the menu item will be outlined with a box.
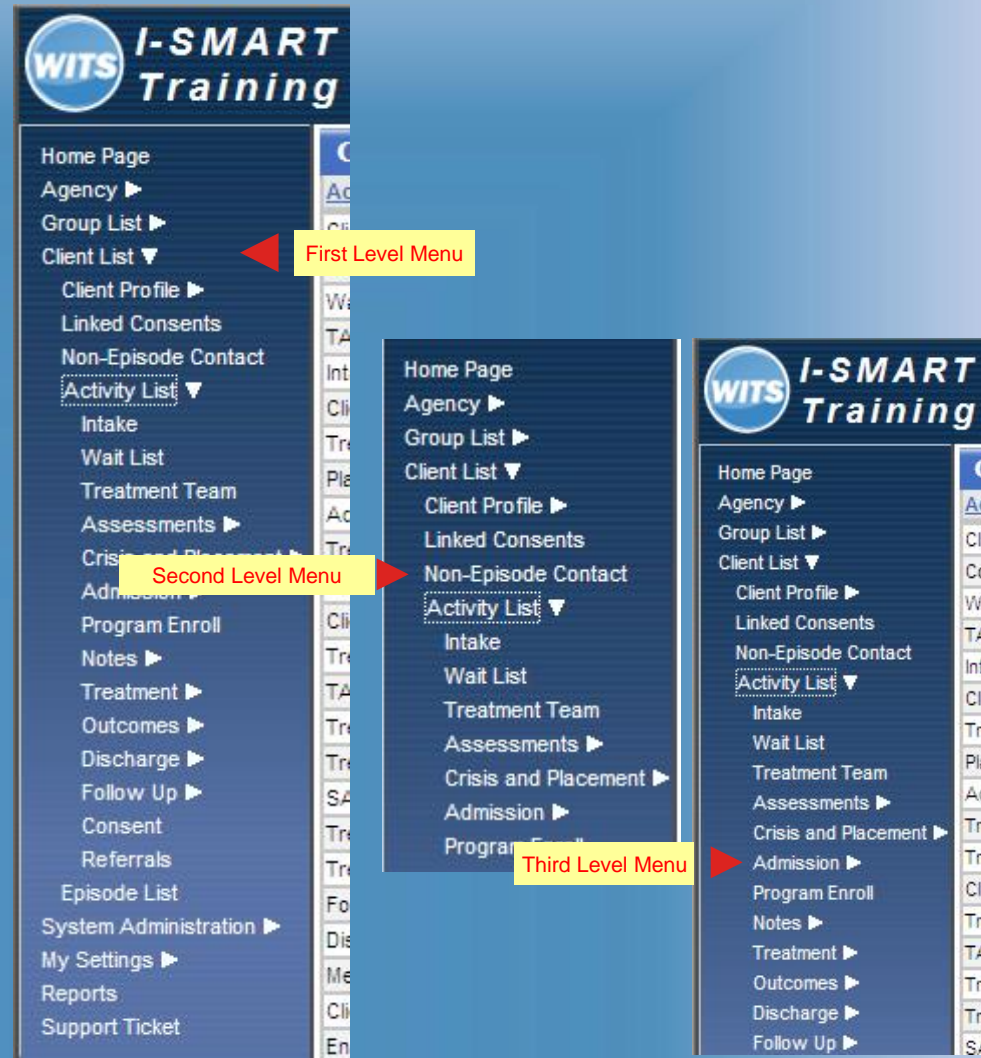
Note: Scroll bars may appear in the menu column depending on the length and width of the menu.

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Toolbar Icons and Hyperlinks

4. **Browser Label:** The browser label will depict the name of the screen and the browser vendor. In this example, the user is in the **Home** screen, and the browser vendor is Microsoft Internet Explorer.

5. **I-SMART Toolbar**: This is the uppermost portion of the screen, and contains the: I-SMART label, User Identity and Context, Print and Help Icons, and logout hyperlink.

6. **I-SMART Icon**: Wherever you are in the application, you may click the I-SMART label to return to the homepage.

7. **User Identity and Context:** Three lines are reserved in the toolbar to identify the user's name, their Agency, and the Facility selected in the context screen. The Agency Nickname may be used to reduce the label length since some agency names are too long for the toolbar.

8. **Print View Icon:** Allows you to print the current screen.

9. **Print Report Icon:** Allows the user to print a formatted record of the current module.

10. **Logout:** Use **Logout** rather than closing the browser window to ensure that you will not be locked out upon trying to start a new session. If you close the window using the red X, you will not be able to login from another computer. You will be asked if you are certain you wish to end the session. Click **Yes**.

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Navigation Buttons

11. **Go:** The **GO** button is used to initiate a query. When used in the login process, it is querying the database to determine if the user is an authorized user. When used in list views, it launches a search for a record based on the data entered in the upper portion of the screen.

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Navigation Buttons

12. **Save:** The **Save** button is used in two ways. First, it allows the user to commit data to the database after completing the required fields, without having to complete the entire form. **Save** may also be used to add multiple records to a list without having to leave the screen. Examples of this function are found on screens such as **Alternate Name, Address** and **Phone**.

13. **Cancel**: **Cancel** returns the user to the previous screen or mode without storing the data entered on the screen**.** In this example, the user was returned to previous *mode (view only)*. They must select <u>Add Alternate Name</u> to add more names. In many cases, **Cancel** will take you to the previous screen.

14. **Finish:** The **Finish** button saves any unsaved data, and returns the user to the top of the menu.

15. **Revoke:** The revoke button is used to revoke a consent that was previously authorized. Revoking the consent, time stamps the revocation so that information passed prior to the revocation is not subject to the constraint. Revocations are not retroactive.

16. **Next Arrow:** ➡ **t**akes the user to the **Next** screen in a series of screens which compose a dataset.

17. **Previous Arrow:** ⬅ takes the user to the **Previous** screen in a series of screens which compose a dataset.

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Table Actions

18. Review: This hyperlink allows the user to either review record details or edit them, depending on their permissions and case status.

19. Delete: The **Delete** hyperlink allows users to delete records without requiring them to go to the detailed view. To reduce inadvertent deletes of important data, this feature is only used in tables where most of the critical record information is displayed in the table. In addition, a warning screen asks the user if they want to delete the record, or return to the table.

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Controls

20. **Textbox:** Text boxes are designed to allow the user to enter data manually. Some text fields have specific formats which must be used:

DOB/Date: mm/dd/yy or mm/dd/yyyy

SSN: 9 digit number, dashes do not need to be entered by user. Last 4 digits are also acceptable.

Phone Number: 7 or 10 digit number, dashes do not need to be entered by user.

21. **Scrolling Textbox:** Scrolling textboxes are used to capture notes and descriptions. A scrolling textbox allows the user to enter at least 500 characters. Some have no character limits. An example of a scrolling textbox is a **Comment** field.

22. **Drop-down box:** A drop down box is used where only one entry may be selected from a list of values.

23. **Mover Box:** A mover box is used where more than one entry may be selected from a list of values. Use the Ctrl key to highlight more than one choice at a time. Some boxes may scroll.

24. **Mover Box with Radio Buttons**: The user selects an option with a single left click. Before selecting the mover arrow, they must select an option, using the radio buttons located between the boxes. In this example, if the user selects **# of Days**, they click the **Radio Button**, and put the number of days in the textbox using the keyboard. The user then moves the options to the select box using the right pointing arrow adjacent to the **Selected** box.

First Name TEDS

First Name Shirley   Note: When a field is read-only, it is grayed-out.

DOB 10/10/37 → DOB 10/10/1987

SSN 485-47-8548

Home Phone # (484) 785-1214

Comments

Ethnicity 0-Not Spanish/Hispanic/Latino M

Races
1-Caucasian
2-Black/African American
4-Asian
5-Hawaiian or Pacific Islander
6-Alaskan Native

Selected Races
3-American Indian

12-Family/Friends
13-Public Assistance
14-Retirement/Pension

None

Consent Options
Admission
Client Diagnosis
Client Information/Summary
Client Needs Matching

Consent Expires Upon
Discharge
# of Days

Selected Options

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Messaging

25. **Messages:** I-SMART displays messages and warnings at the top of the screen, just below the toolbar, when required.

26. **Error**: A red circle with an X indicates the failure to provide **required** data. This means that the record cannot be saved until the data is completed. Warnings may be used for incorrect formats, if the incorrect format is for a required field. In addition to the error message, the field in error is colored red. The user may type directly over the red box to correct the data so that it may be saved to the database.

27. **Information Messages**: Information messages direct the user to complete the appropriate steps to continue most tasks in I-SMART. In most cases with information messages, you will not lose data, and you may proceed if you choose to ignore the message.

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Insert, View and Search

28. **General:** There are three modes in I-SMART: Insert, View, and Search. Each mode allows the user to perform a pre-determined set of functions.

29. **Insert:** In most cases, when you first enter a screen, you will be in insert mode. This mode allows you to make entries into most fields in the screen, and save them to the database. When you select a screen from a menu, click next, or use a hyperlink to navigate to a screen, you are usually in this mode.

30. **Read Only**: Sometimes I-SMART will not allow the user to modify any information in the screen. This is usually done to protect data integrity. When you enter a screen in this mode, all fields will be read-only, and grayed out. An example of this is the Closed Case Intake Screen.

However, this view mode is also used in some cases where the user is adding data to a table on the same screen. Examples of this include the addition of addresses and alternate names. In these cases, the Add hyperlinks are used to move the user from view to insert mode.

31. **Search:** Some list screens will allow the user to perform searches based on criteria. When in **Search** mode, you will usually see a **Cancel** and a **Go** button, rather than Save, Cancel, Finish. The Client List is an example of this feature.

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Search

32. **Exact Match:** This type of search is to find records which match the search criteria exactly. Therefore, if you type First Name = James, you will only get Clients who have the first name of James. You may constrain the search results by adding other parameters such as **First Name, DOB**, and **Facility** to reduce the number of erroneous results.

33. **Wild Card:** Wild card searches are very useful in cases where you do not have the exact value or spelling of a parameter. It allows you to search with just three characters. To use the wildcard search, place an asterisk after, before, or on both sides of the known characters of the parameter. Hit Search. The Search will return all values with a string of characters which match the characters provided by you.

   D*- will return any string starting with D or d.

   *s- will return anything ending in s.

34. **Range Expression:** This search allows you to search a range of values when given two specific values. In the Reports Module entering a date range such as 01/01/2000 : 12/31/2000 – returns any record with a date in the year 2000.

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Conventions

35. **Required Fields:** Required fields will be indicated by a yellow background.

36. **Incomplete Required Fields:** Incomplete required fields will generate a warning or error, and will be indicated by a red background.

37. **State Required Reporting:** If a field is not required for data integrity, but is required to support reporting requirements for the State or Agency, the background is light yellow.

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Help

38. Mouse-over tips: Some fields will display a description of the accepted value.

38. Staff Index Card: Clicking the Index Card icon next to a staff name will open the staff info window. This allows you to easily find contact information for staff you may not know or for whom you do not have contact information.

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Creating a Shortcut

40. You can make I-SMART a Favorite by clicking the Favorite Star and then Click the Add to button

40. Some browsers allow you to create a shortcut which will save time in completing the login process. To create a shortcut, go to the login page.

41. Right-click in the open area. Select **Create Shortcut** from the menu**.**

42. You will be told that the shortcut will be added to your desktop. Click **OK.**

43. You will see it on your desktop.

44. Optional. Right click on the icon. Select **Rename.** You may rename the icon to I-SMART.

45. The above can be done before logging into I-SMART.